



Integrating a Tactical-level Staff into an Operational-level Headquarters

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The nature of the challenges to the US and its interests demand that the Armed Forces operate as a closely integrated joint team with interagency and multinational partners across the range of military operations.¹

- Joint Publication 1-0, Doctrine for the Armed Forces

The Army, as part of joint, interorganizational, and multinational teams, provides multiple options to the Nation's leadership, integrates multiple partners, and operates across multiple domains to present adversaries with multiple dilemmas and achieve sustainable outcomes.²

-The U.S. Army Operating Concept, "Win in a Complex World"

A successful integration of a tactical battalion into an operational or strategic-level joint task force is based on a common headquarters organization, recognition of subject matter expertise, a willingness to learn, and the ability to create and foster relationships. Success, in terms of integration, can be quantified by how quickly the joining force becomes fully mission capable within the command structure after assignment to a headquarters. The integration of Task Force Steel Tiger into Combined Joint Task Force – Horn of Africa (CJTF-HOA) during a recent deployment in support of Operation Freedom's Sentinel provides a case study for such a successful integration.

Background

In January 2015, 3rd Armored Brigade Combat Team, 1st Armored Division (3/1AD) assumed the mission of US Africa Command's (USAFRICOM) Regionally Aligned Brigade (RAB).³ The RAB was tasked to provide a Security Force (SECFOR) battalion under the operational control of the Commanding General, CJTF-HOA. The SECFOR also conducts a variety of missions similar to those assigned to the RAB, including Security Force Assistance events throughout CJTF-HOA's Combined Joint Operations Area (CJOA), though at a smaller scale. In February 2015, 1st Battalion, 77th Armor "Steel Tigers" assumed authority as the CJTF-HOA SECFOR battalion. The Steel Tigers provided more than 800 Soldiers in direct support to CJTF-HOA, US Navy, and US Air Force elements at three operating locations in two East African countries. The battalion was also tasked to provide an infantry company and battalion tactical command post to serve as the East Africa Response Force (EARF).



The EARF is a US Army infantry company, with enablers from across the joint force, forward staged at Camp Lemonnier, Djibouti, whose purpose is to provide crisis response options to the USAFRICOM Commander.⁴ The EARF was established in CJTF-HOA at the direction of USAFRICOM in order to overcome the “tyranny of distance” in East Africa.⁵ The EARF’s ability to provide additional security at a US Embassy in order to facilitate continued operations and protect American lives and property was validated from December 2013 to April 2014 at US Embassy Juba, South Sudan where the US Ambassador requested, and received, deployment of the EARF.⁶

The core of Task Force Steel Tiger was a Combined Arms Battalion comprised of two mechanized infantry companies, two armor companies, a headquarters company with organic scout and mortar platoons, and a forward support company. The task force was augmented with a self-propelled artillery battery, a combat engineer platoon, two infantry platoons, and an additional scout platoon.

CJTF-HOA is the only joint task force permanently based on the African continent. Headquartered in Camp Lemonnier, Djibouti, CJTF-HOA provides the USAFRICOM with a forward deployed mission command element focused on operations in ten countries in East Africa and the Indian Ocean. An operational-level headquarters consisting of service members individually deployed from all military services and components, the CJTF-HOA joint staff is made up primarily of US Navy and US Army Reservists.

Regardless of the level of war a headquarters is situated in, the staff serves to support the commander’s decision-making process. According to US Army doctrine, “[s]taffs support the commander in understanding situations, making and implementing decisions, controlling operations, and assessing progress.”⁷ Joint Doctrine reiterates this concept by describing the Joint Operations Planning Process (JOPP) as the method for joint staffs to translate “the commander’s planning guidance into a feasible [Course of Action] and [Concept of the Operations] by which the joint force can achieve its assigned mission and military end state.”⁸ Because of their unity of purpose and end states, staffs have the potential, and necessity, to integrate at every level.

Headquarters that are built along the traditional J-code structure provide the best opportunity for the successful integration of staff and external elements.⁹ This structure serves to create a headquarters that defines responsibility for supporting three primary aspects of commander decision-making: “how to gain broader operational environment understanding beyond that only of the military threat (including identification of the problem), who conducts assessments, and who plans, conducts, and oversees inform and influence activities.”¹⁰ While it is true the standard J-code structure creates an environment conducive to creating unity of command and



accountability to the Chief of Staff for directorate heads, its most important function during staff integration is providing a structure that is very similar to, and easily understood by, a tactical-level staff.

Integrating Task Force Steel Tiger's Staff into CJTF-HOA's Directorates

During the 2015 deployment to CJTF-HOA, Task Force Steel Tiger deployed a complete battalion staff. While the battalion staff sections did not line up perfectly with those of CJTF-HOA, the primary functions of each principle J-code corresponded with a battalion staff section. Therefore, it was fairly simple to integrate battalion staff functions with their partner J-code. While there was a large difference in the scale of capabilities and responsibilities, the requirements for each were very similar.

For example, the CJTF-HOA CJ4 was responsible for providing logistics to US military elements in more than ten countries spread out over thousands of miles. The battalion S4 was responsible for logistics and contracting within a much smaller area, though these functions were located within two separate CJTF-HOA J-codes. Our Battalion Logistics Officer quickly learned which directorate he had to interact with in order to ensure our Soldiers were supplied appropriately. The Battalion Personnel Officer knew how to work emergency leave, personnel accountability, and financial concerns within the CJTF-HOA CJ1 staff. The integration of the Battalion Intelligence section into the CJTF-HOA Joint Intelligence Center (JIC) was more in depth as the battalion received a specified task to provide intelligence analysts to support JIC operations. Overall, there was very little confusion in where a specific battalion staff section would find support within the CJTF-HOA directorates. By following a standard J-code structure, CJTF-HOA supported the integration of units assigned or attached.

In all large headquarters organizations there are entities and requirements that lie outside of the standard J-code structure. The battalion also provided "borrowed military manpower"¹¹ within the Commanding General's Special Staff, CJ4, and CJ8. These Soldiers worked directly for the gaining staff elements and were only supported administratively by the battalion. Because the SECFOR battalion is the largest single unit in CJTF-HOA, many outside the battalion only see the battalion's pool of manpower and not the myriad missions it conducts. As such, a general default is to assign any additional tasks to the SECFOR battalion. This reliance on using manpower from an on-hand source appeared to be the result of CJTF-HOA having to move at the speed of a problem instead of the Global Force Management System. The capabilities of the joint task force may be negatively affected without the additional flexibility



provided by the manpower inherent within an attached tactical battalion. A tactical battalion must have a firm grasp of the critical mission requirements of the Request for Forces (RFF) that battalion is filling, as well as any higher headquarters orders. By creating shared understanding of the missions and priorities through successful integration, a tactical battalion is able to understand the impacts any support provided, or not provided, would have on the success of the operational headquarters.

Although integration of the entire staff is important, the most crucial integration that must occur between a tactical battalion and operational headquarters involves operations. As with any military organization, the "3-Shop" operationalizes the Commander's Mission and Intent. The interaction between Task Force Steel Tiger and CJTF-HOA was no different. Therefore, the battalion S3 shop must be directly integrated into the CJ3.

There are two parallel methods of accomplishing this: assigning a Liaison Officer (LNO) to the Joint Operations Center (JOC) and integration into the Bureaus, Boards, Centers, Cells, and Working Groups (B2C2WG) system (also called a Battle Rhythm). The integration of an LNO in a higher headquarters is standard operating procedure at the battalion-level and exercised during Combat Training Center rotations. The CJTF-HOA Current Operations staff provided dedicated workspace for the battalion LNO, allowing Task Force Steel Tiger to maintain real-time situational awareness of activities throughout the CJOA and to seamlessly integrate the Battalion Operations Officer on short notice, if required.

Integrating into the B2C2WG system was equally important. An operational headquarters employs a large number of field grade staff officers, while a tactical Army battalion traditionally has only two: the Battalion Executive Officer and Operations Officer. For example, the CJTF-HOA CJ3/5/7 had five O-6 officers and more than triple that number of O-5s, O-4s, and O-3s. The capability to plan and execute created by this large number of senior staff officers is impossible for a tactical battalion to match. This discrepancy in size between the two staffs places a large emphasis on the use of a knowledge management program to ensure that all battle rhythm events are clearly value-added for participants. Through the use of knowledge management tools similar to "7-Minute Drills,"¹² [see figure 1] a headquarters facilitates the integration of all partners and subordinate units.¹³

To meet the task force's requirement for attendance at battle rhythm events as detailed in the corresponding 7-Minute Drill, the battalion relied on company grade staff officers (First Lieutenants and Captains). These company grade officers became subject matter



experts in their assigned fields. For example, our Battalion Logistics Officer (a First Lieutenant) attended the CJTF-HOA Joint Logistics Working Group chaired by the Deputy CJ4 (an O-5) and primarily attended by field grade officers; the Task Force Engineer became the recognized expert on force protection and counter-mobility projects within CJTF-HOA following; the Battalion Intelligence Officer the Task Force Fire Support Officer (a First Lieutenant) served as the representative within the CJTF-HOA Theater Support Coordination cell, a large entity within the CJTF that was commanded by an O6 with 10 country desks representing each nation within the Combined Joint Operations Area (CJOA) manned by a field grade officer. Without the ability of these officers to become recognized as subject matter experts in their specific field, the battalion would not have been a productive and successful partner in CJTF-HOA.

Battle Rhythm Event Charter **- aka "Seven Minute Drill" -**

1. **Name of battle rhythm event:** Descriptive and unique
2. **Lead J code:** Who receives, compiles, and delivers information
3. **When / where does it meet in battle rhythm?:** Allocation of resources (time and facilities), and any collaborative tool requirements
4. **Purpose:** Brief purpose of the battle rhythm event
5. **Inputs required from:** Staff sections and/or B2C2WGs required to provide products (Once approved by CoS, these become specified tasks)
6. **When?** Suspense DTG for inputs
7. **Output / Process / Product:** Products and links to other B2C2WGs
8. **Time of delivery:** When outputs will be available
9. **Membership codes:** Who has to attend (Task to staff to provide reps)

Figure 1: 7-Minute Drills

This use of company grade officers to integrate into the B2C2WG system was facilitated by their ability to cultivate and maintain personal relationships. These officers demonstrated mastery of the capabilities and limitations of Task Force Steel Tiger, showed



a willingness to work with other staff members from different branches and nations, and strived to learn more about the organizations within CJTF-HOA.¹⁴ The ability for a tactical battalion to function while directly attached to an operational headquarters is almost entirely based on such relationships. The difference between the two levels of war, coupled with the potential for staffers at the operational-level headquarters to have little experience with the Army or tactical-level operations, creates a potentially challenging framework in which to operate. The relationships built on recognized subject matter expertise overcame these challenges and fostered trust.

While the initial reaction of many field grade officers within the CJTF-HOA staff was to rely on peer-to-peer interactions, these company grade officers earned the respect of joint and multinational superiors after demonstrating their knowledge of Task Force Steel Tiger and Army operations. The use of company grade staff officers as primary representatives at battle rhythm events was par amount to Task Force Steel Tiger's success, as mandating a field grade officer at every meeting would have greatly diminished the execution of daily operations for the battalion.

One additional event that lays the groundwork for staff integration is the Pre-Deployment Site Survey (PDSS). The PDSS was an integral part of gaining shared understanding of the battalion mission and the requirement for integration with CJTF-HOA. Task Force Steel Tigers conducted a PDSS approximately 90 days prior to the transfer of authority. The attendees included the Battalion Commander, Command Sergeant Major, Operations Officer, the Officer or Non-Commissioned Officer in Charge of each battalion staff section, and a member of each company/battery's command team. This four-day event created a base of knowledge within the task force that was invaluable in pre-deployment preparations.

Key leaders within the battalion, down to the company level, were provided with an overview of operations being conducted prior to arrival. These key leaders were given the opportunity to ask questions, formulate courses of action, and receive lessons learned from the previous unit that were directly integrated into training and preparation being conducted prior to the deployment. It also created the foundation for future relationships by putting "a face to a name" and creating the beginnings of shared understanding within the task force and CJTF-HOA.

Vignette of Successful Staff Integration



An example of overcoming these challenges and successfully integrating staffs was on display during periodic East Africa Response Force (EARF) exercises. While the EARF is a joint task force that integrates enablers from the US Air Force and US Navy, it is an Army-based organization in tactics, techniques, and procedures. By virtue of the fact that the EARF is under the operational control of CJTF-HOA, an all-encompassing validation exercise is a joint operation. The CJTF-HOA Exercises Cell was comprised of all Navy Reservist personnel with little experience planning and evaluating an Army-style operation. Recognizing the difference in experience and service language, the planning and execution of the exercise was broken down between all the participating elements. More importantly, the metrics being used to evaluate this exercise were based on the theater campaign plan and were widely understood beforehand through the use of joint doctrine and common terms.

The CJTF-HOA Exercises Cell took the lead on providing the structure, timeline, and required coordination for exercise planning and execution. As the higher-level headquarters validating the capabilities of the EARF, this staff element also provided the exercise storyline, background, and injects. They coordinated the support for planning the event with the J-codes throughout CJTF-HOA, ensuring the incoming EARF element was properly prepared prior to executing the training exercise.

The EARF validation exercise was developed around a simulated call for reinforcements by US Embassy Juba, South Sudan. Simulated open-source intelligence was provided to watch standers at the CJTF-HOA JOC that indicated an increase in political tensions and escalating violence in the Juba area on the day before the validation exercise. On the morning of the exercise, CJTF-HOA received notice from USAFRICOM to prepare to deploy the EARF based on a request they had received from the Department of State via the Pentagon. A no-notice activation allows the EARF team to demonstrate that they can complete all pre-deployment requirements within the allotted period after notification.

Once the request for reinforcements was made, CJTF-HOA's Crisis Action Planners stood up an Operational Planning Team (OPT) to review the current situation and ensure that the Command Staff was prepared to support the EARF in their deployment. The EARF team went through the process of issuing required equipment, palletizing and loading gear onto a C-130J, and updating their ground tactical plan. The Commanding General, after being briefed by both the Crisis Action Planners and the EARF leadership, authorized the EARF to deploy to South Sudan resulting in the end of the exercise. While the actual execution of the EARF exercise was



required to ensure Task Force Steel Tiger was certified to assume their mission, it was the planning and assessment of the exercise itself which provided the opportunity to integrate the battalion and CJTF-HOA staffs.

The exercise assessment team, commonly referred to as a "White Cell," provided observer/controllers for every element involved in the exercise. Given that the exercise involved the entire CJTF-HOA joint staff, more than 20 observer/controllers were put into action. These included subject matter experts for specific enablers, personnel evaluating the JOC's ability to track events, and evaluators looking at the execution of the EARF. The EARF battalion provided the expertise on the planning and execution of the ground tactical plan. Leadership from enabler elements provided the subject matter expertise on their specific functions. Because of this, the exercise planning personnel deferred to the EARF and enabler planners for tactical requirements and assessments while demonstrating their subject matter expertise in coordinating the joint, intergovernmental, interagency, and multinational partners required for such an event.

The evaluation process was capped off with an informal evaluation immediately following the exercise and a more formal After Action Review consisting of all enablers, J-codes, and White Cell members. The results of this AAR were briefed to the Commanding General, providing a source of lessons learned that were then integrated into follow-on exercises.

The Exercise Cell provided an environment to build long-lasting professional relationships through the recognition of subject matter expertise that resulted in tighter integration of all elements involved. This exercise also demonstrated the ability to integrate a battalion-level staff into an operational headquarters with little redundancy of effort, while providing valuable experience to not only the Soldiers and leaders at the tactical-level but also the staff members at the operational-level who are tasked to support them.

Conclusion

The integration of a battalion staff directly into an operational headquarters will become more common in the future. While the process is not without tension and friction, it can be successful. By building relationships based on mutual recognition of subject matter expertise and a demonstrated willingness to learn, the joint staff at CJTF-HOA and Task Force Steel Tiger successfully integrated during the latter's deployment as a regionally aligned force. This integration had a significant positive impact on the success of their mission in the Horn of Africa.



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NOTES

1. Joint Publication 1-0, *Doctrine for the Armed Forces*, (Washington, DC: U.S. Government Printing Office [GPO], 13 March 2013), i.
2. TRADOC Pamphlet 525-3-1, *The U.S. Army Operating Concept: Win in a Complex World*, (Washington, DC: U.S. GPO, 31 October 2014), vi.
3. David Burge, “Steel Tigers: About 700 Fort Bliss soldiers deploying to Djibouti for security, training mission,” *El Paso Times*, 19 January 2015, accessed 31 May 2015, http://www.elpasotimes.com/news/ci_27345987/steel-tigers-about-700-soldiers-will-be-deploying.
4. Michelle Tan, “Quick-reaction force stands up in East Africa,” *Army Times*, 23 June 2013, accessed 13 July 2015, <http://archive.armytimes.com/article/20130623/NEWS08/306230003/Quick-reaction-force-stands-up-East-Africa>.
5. LTC Robert E. Lee Magee, “Crisis Response: the East African Response Force in South Sudan,” *eARMOR*, January 2015, accessed 13 July 2015, http://www.benning.army.mil/armor/eARMOR/content/issues/2015/JAN_MAR/Magee.html.
6. Ibid.
7. ATTP 5-0.1, 13.
8. Joint Publication 3-0, *Joint Operations*, II-6.
9. Joint Staff J7, “Second Edition of the Joint Headquarters Organization, Staff Integration, and Battle Rhythm Insights and Best Practices Focus Paper,” July 2013, 1. This paper describes how a joint staff should be structured and operate in order to integrate the teams required to solve problems in any operational environment.
10. Ibid, 2.
11. Term utilized at Fort Bliss to describe Soldiers assigned to a unit but supporting a higher headquarters as a tasking. These taskings are used to fulfill manpower requirements that are not sourced.
12. Also called a “charter.” Figure 1 comes from Joint Staff J7, p. 12.
13. Joint Staff J7, 12.
14. US Army Asymmetric Warfare Group, “Operations and Intelligence Fusion Centers for Partner Nations Handbook,” March 2015, 3-5. Though this resource was not used at the time, members of the staff who were successful at integrating with the CJTF-HOA staff demonstrated the qualities found in Table 5-1, “Characteristics of Successful Interagency Team Members.”